MANITOBA
POPULATION AND
DEMOGRAPHIC PROJECTIONS
2013 TO 2038
- OVERVIEW -

MANITOBA
BUREAU OF STATISTICS

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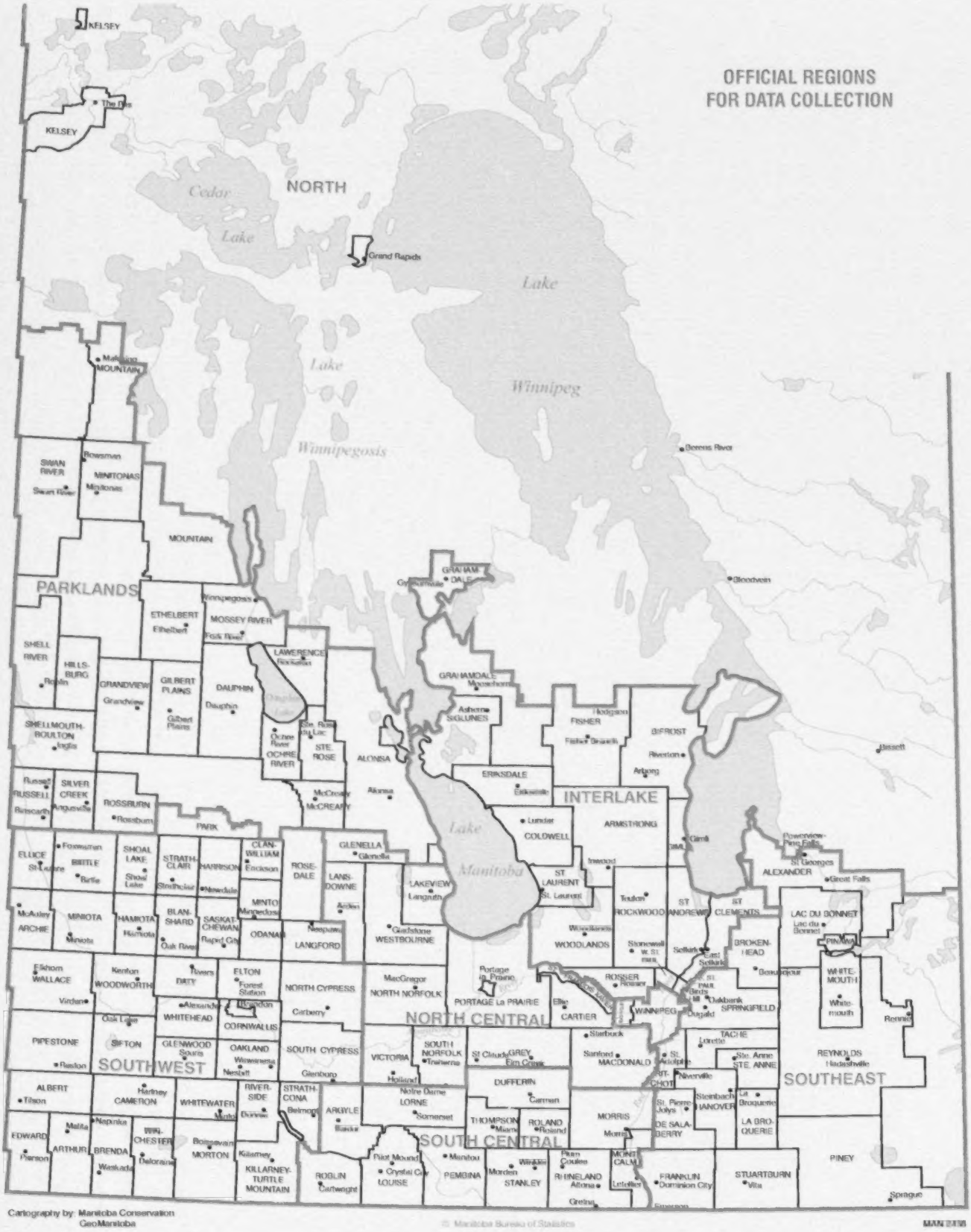
OCTOBER 2015

EXECUTIVE SUMMARY: Medium Scenario

- *Population:*
  - The Manitoba Bureau of Statistics (MBS) projects Manitoba's population will reach 1,398,500 residents on July 1, 2020.
  - MBS expects that compared to its estimate of 1,281,600 residents on July 1, 2013, Manitoba's population will increase by 116,900 individuals (9.1%) by July 1, 2020.
  - Manitoba's population is projected to increase by an average of 1.3% per year between 2013 and 2020.
  - The regions of South Central (12.1%) and Southeast (11.9%) are projected to experience the strongest rates of population growth from 2013 to 2020.
  - The Parklands is the only region with a projected population decline between 2013 and 2020, contracting by 5.6%.
  - For Manitoba, MBS' alternate scenarios predict average annual changes of 1.2% (Low) and 1.5% (High) between 2013 and 2020.

- *Age Structure:*
  - MBS projects that on July 1, 2020, half of Manitoba's population will be older than 38.0 years, while the other half will be younger.
  - The median age for the Economic Region of Winnipeg is projected to reach 38.9 years, slightly older than the province as a whole.
  - In terms of median age, the youngest regions are expected to be the North (26.3 years) and South Central (32.9 years). MBS anticipates the oldest regions will be Parklands (45.3 years) and the Interlake (44.3 years).

- *Components of Population Change:*
  - The number of births for Manitoba is projected to be 18,200 in 2020/21. MBS expects Winnipeg women will give birth to 49.0% of these babies, while North women will have a 12.2% share.
  - MBS anticipates Southeast will record the largest net intraprovincial inflow in 2020/21, gaining 860 migrants from other parts of the province. Winnipeg is projected to register the largest outflow, losing 720 residents.
  - Manitoba is projected have a net outflow of 3,800 residents moving to other parts of Canada in 2020/21. Winnipeg's net interprovincial loss is expected to be 2,680 migrants for the period.
  - MBS anticipates Manitoba will have a net inflow of 13,100 people from other countries in 2020/21. Winnipeg is expected to receive 82.1% of Manitoba's net international migrants.
  - Total net migration for Manitoba is predicted to reach 10,800 migrants for the twelve months ending June 30, 2021. Winnipeg is projected to achieve a net inflow of 8,250 migrants, while a net outflow of 620 residents is expected for the North.


OFFICIAL REGIONS
FOR DATA COLLECTION
NORTH
KELSEY
The Pas
Cedar Lake
Grand Rapids
Lake Winnipeg
Lake Winnipegosis
Berens River
Gods River
Gods Lake
Island Lake
Oxford House
Bloodvein
Manigotagan
Hollow Water
Black River
Little Grand Rapids
Pauingassi
Poplar River
Pikwitonei
Wabowden
Thompson
Nelson House
Split Lake
Norway House
Cross Lake
Moose Lake
Ilford
Gillam
Fox Lake
Shamattawa
Oxford House
Gods River
Gods Lake
Island Lake
Red Sucker Lake
Garden Hill
Wasagamack
St. Theresa Point
Wanipigow
Bissett
Powerview-Pine Falls
St Georges
Great Falls
ALEXANDER
LAC DU BONNET
PINAWA
WHITE-MOUTH
Whitemouth
Rennie
REYNOLDS
Hadashville
SOUTHEAST
PINEY
Sprague
BROKEN-HEAD
Beausejour
TACHE
Ste. Anne
STE. ANNE
Niverville
LA BROQUERIE
Steinbach
HANOVER
Landmark
Grunthal
Mitchell
Gretna
Emerson
FRANKLIN
Dominion City
STUARTBURN
Vita
MORRIS
Morris
DE SALABERRY
ST-PIERRE-JOLYS
St. Pierre-Jolys
RHINELAND
Altona
Plum Coulee
Winkler
Morden
STANLEY
MONTCALM
Letellier
PEMBINA
Manitou
Pilot Mound
Crystal City
LOUISE
ROBLIN
Dartwright
KILLARNEY-TURTLE MOUNTAIN
Killarney
Boissevain
MORTON
WHITEWATER
Waskada
BRENDA
Deloraine
WINCHESTER
Napinka
Melita
EDWARD
Pierson
ARTHUR
ALBERT
Tilson
Hartney
CAMERON
PIPESTONE
Reston
SOUTHWEST
SIFTON
Virden
Kenton
WOODWORTH
Elkhorn
WALLACE
Oak Lake
Alexander
WHITEHEAD
Rapid City
Miniota
ARCHIE
McAuley
MINIOTA
HAMIOTA
Hamiota
Oak River
Tilston
Souris
GLENWOOD
Glenboro
SOUTH CYPRESS
Carberry
CORNWALLIS
Brandon
NORTH CYPRESS
Neepawa
ODANAH
LANGFORD
Gladstone
WESTBOURNE
Arden
LANSDOWNE
Minto
MINTO
Erickson
CLAN-WILLIAM
Strathclair
STRATH-CLAIR
Shoal Lake
SHOAL LAKE
Foxwarren
BIRTLE
Birtle
ELLICE
St Lazare
Russell
RUSSELL
Binscarth
SILVER CREEK
Angusville
ROSSBURN
Rossburn
PARK
Minnedosa
HARRISON
Rapid City
SASKATCHEWAN
Oak River
BLANSHARD
Rivers
DIRTY
Alexander
ELTON
Forrest Station
OAKLAND
Wawanesa
Nesbitt
RIVERSIDE
Darlingford
STRATHCONA
Belmont
ARGYLE
Baldur
ROSEDALE
GLENELLA
Glenella
LAKEVIEW
Langruth
MacGregor
NORTH NORFOLK
PORTAGE La PRAIRIE
Portage la Prairie
Elie
CARTIER
SOUTH NORFOLK
Treherne
VICTORIA
Holland
Notre Dame
LORNE
Somerset
St Claude
GREY
Elm Creek
DUFFERIN
Carman
THOMPSON
Miami
ROLAND
Roland
SOUTH CENTRAL
Starbuck
Sanford
MACDONALD
Macdonald
Oakbank
SPRINGFIELD
Dugald
WINNIPEG
ROSSER
Rosser
Stonewall
St Laurent
WOODLANDS
Woodlands
Teulon
ROCKWOOD
ST ANDREWS
ST CLEMENTS
East Selkirk
Selkirk
St Andrews
Birds Hill
PINE RIVER
Lundar
COLDWELL
ARMSTRONG
Inwood
ERIKSDALE
Eriksdale
Ashern
SIGLUNES
Hodgson
FISHER
Fisher Branch
BIFROST
Riverton
Arborg
GRAHAMDALE
Moosehorn
Gypsumville
ALONSA
Alonsa
Ochre River
OCHRE RIVER
Ste. Rose du Lac
STE. ROSE
McCreary
McCREARY
Russell
Binscarth
Rossburn
Angusville
Birtle
Foxwarren
Shoal Lake
Strathclair
Minnedosa
Erickson
Rapid City
Oak River
Rivers
Alexander
Carberry
Neepawa
Gladstone
Arden
Minto
Hamiota
Miniota
Virden
Kenton
Oak Lake
Reston
Souris
Glenboro
Holland
Treherne
Somerset
Baldur
Belmont
Darlingford
Killarney
Boissevain
Deloraine
Napinka
Melita
Pierson
Waskada
Tilson
Hartney
Elkhorn
Russell
Foxwarren
St Lazare
Shoal Lake
Birtle
Binscarth
Rossburn
Angusville
Riding Mountain
Swan River
Swan River
Rowsman
Minitonas
Mountain
Winnipegosis
Ethelbert
Mossey River
Lawrence
Dauphin
Gilbert Plains
Grandview
Shellmouth-Boulton
Shell River
Hillsburg
Inglis
Riding Mountain
PARKLANDS
Ethelbert
Winnipegosis
Pine River
Dauphin
Gilbert Plains
Grandview
Inglis
Roblin
Dartwright
Crystal City
Pilot Mound
Manitou
Winkler
Morden
Plum Coulee
Altona
Rhineland
Letellier
Dominion City
Franklin
Vita
Stuartburn
Piney
Sprague
Emerson
Gretna
Landmark
Grunthal
Mitchell
Steinbach
Hanover
Niverville
Ste. Anne
Ste. Anne
Tache
Loretta
Starbuck
Sanford
Macdonald
Oakbank
Springfield
Dugald
Winnipeg
Rosser
Stonewall
St Laurent
Woodlands
Teulon
Rockwood
St Andrews
St Clements
East Selkirk
Selkirk
Pine River
Birds Hill
Lundar
Coldwell
Armstrong
Inwood
Eriksdale
Ashern
Siglunes
Hodgson
Fisher
Fisher Branch
Bifrost
Riverton
Arborg
Grahamdale
Moosehorn
Gypsumville
Alonsa
Ochre River
Ste. Rose du Lac
Ste. Rose
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Lake Manitoba
Lake Winnipeg
Lake Winnipegosis
Cartography by: Manitoba Conservation
GeoManitoba
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INTRODUCTION

The Manitoba Bureau of Statistics (MBS) has used its Regional Cohort Component Model to develop three projection scenarios for Manitoba. MBS derived the base population by incorporating an adjustment for statistical anomalies in Statistics Canada's net undercoverage results, effectively adding 16,154 individuals to Statistics Canada's estimate of Manitoba's July 2013 population (see Notes to Users).

The projection scenarios, labelled **Low**, **Medium** and **High**, assume the same constant regional fertility and the same moderate increase in life expectancy at birth. However, MBS developed distinct migration assumptions for each scenario.

MBS assumes the Medium scenario is most likely to occur. The other two scenarios utilise migration assumptions that result in more (High) and less (Low) population for Manitoba. Data for Manitoba's Economic Regions is released for the Medium scenario only.

This report has been prepared to give a broad overview of MBS' current set of population and demographic projections.

The Economic Regions

Manitoba is divided into eight Official Regions for Data Collection, also known as Economic Regions (see the map on page 2). The following table shows the association between Manitoba's Economic Regions and its Census Divisions.

ECONOMIC REGION NAME	ECONOMIC REGION CODE	CENSUS DIVISION	BASE POPULATION 2013	BASE POPULATION DISTRIBUTION (%)
Southeast	10	1, 2, 12	110,100	8.59
South Central	20	3, 4	64,400	5.02
Southwest	30	5, 6, 7, 15	111,800	8.72
North Central	40	8, 9, 10	50,200	3.92
Winnipeg	50	11	717,100	55.95
Interlake	60	13, 14, 18	92,900	7.25
Parklands	70	16, 17, 20	41,300	3.22
North	80	19, 21, 22, 23	93,700	7.31
Manitoba Total			1,281,600	100.00

Note: Population is for July 1 of given year. Numbers may not add to totals due to rounding.

Data Source: Manitoba Bureau of Statistics

Further information can be obtained from the Manitoba Bureau of Statistics by contacting Tara Newton at 204-945-2406.

NOTES TO USERS

Projections are not forecasts

Projecting population growth and demographic change is not the same as forecasting. A forecast tells what the most likely future will be. A projection, however, attempts to establish plausible scenarios of population growth, based on assumptions made about demographic components such as fertility and mortality rates, as well as migration flows. The resulting projection is what would occur if the stated assumptions were to hold true.

Component assumptions are based on current demographic trends, which will eventually change. Making precise assumptions about the number of immigrants and the flows of people moving between provinces is an especially difficult process, since any number of external factors can more readily influence these components. As the process of change is cumulative, the reliability of projections may decrease over time.

Projections are not guarantees. These possible scenarios of population growth are the result of the stated projection assumptions.

Adjustment of Base Population

The Manitoba Bureau of Statistics firmly maintains that due to statistical anomalies in their net undercoverage results, Statistics Canada substantially underestimated Manitoba's May 10, 2011 population.

To mitigate this undercount, MBS developed its own series of population estimates by age, gender and economic region, going back to July 1, 2007.

These population projections utilise MBS' population estimate for July 1, 2013, which incorporates an additional 16,154 individuals.

Assumptions

All of the projection scenarios assume the same constant regional fertility. However, Manitoba's projected total fertility rate does not remain constant, as it is calculated using regional projection results. The projection scenarios all assume the same moderate increase in life expectancy at birth. Three distinct migration flow assumptions were developed, based on trends for various time-periods.

	By 2015	By 2020		
Component	All Scenarios	Low	Medium	High
Total Fertility Rate	1.89	1.92	1.92	1.92
Life Expectancy - Male	77.5	78.3	78.3	78.3
Life Expectancy - Female	82.0	82.5	82.5	82.5
Net Interprovincial Migration	-4,700	-5,500	-3,800	-2,400
Net International Migration*	14,700	12,000	14,600	17,500

*In addition to immigration less emigration, this includes net non-permanent residents, plus returning emigrants, less net temporary emigrants.

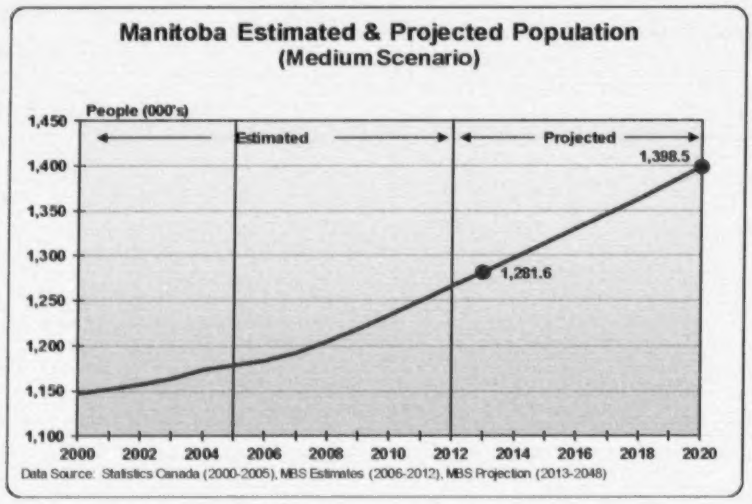
Data Source: Manitoba Bureau of Statistics

HIGHLIGHTS

Continuing Growth

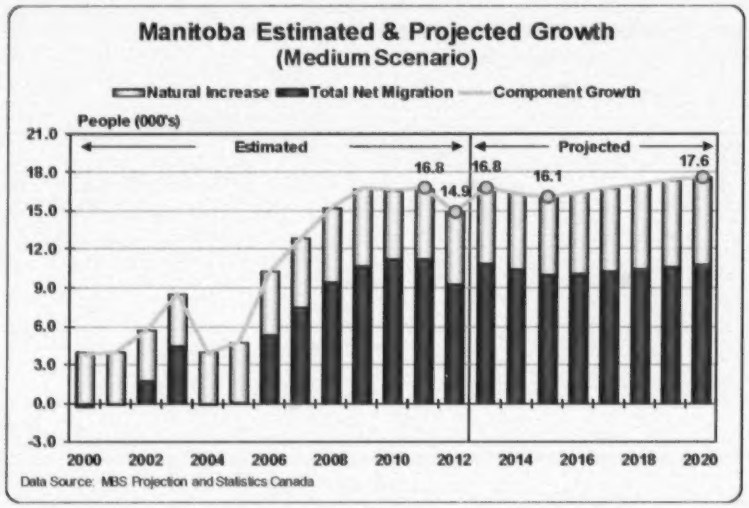
The Medium scenario, as formulated by the Manitoba Bureau of Statistics (MBS), projects Manitoba's population will reach 1,398,500 residents on July 1, 2020. MBS anticipates a total increase of 116,900 individuals from its estimate of 1,281,600 Manitobans on July 1, 2013.

From July 1, 2013 to July 1, 2020, the population of Manitoba is projected to increase by an average of 16,700 people annually, resulting in an average annual change of 1.3%.



Manitoba's population increased by 16,800 individuals over the twelve months ending June 30, 2012, however there was a gain of only 14,900 residents over the 2012/13 period. MBS anticipates that after rebounding for 2013/14, Manitoba's annual population growth will decline over the short-term. After reaching a low of 16,100 individuals in 2015/16, an increasing trend in annual population gains is expected.

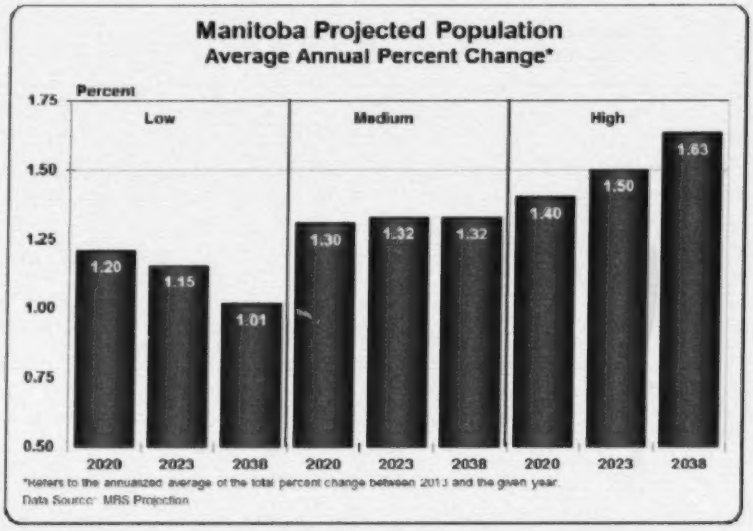
Between July 1, 2020 and June 30, 2021, MBS anticipates that Manitoba will have a population gain of 17,600 residents. A total net inflow of 10,800 migrants from both international and interprovincial sources is projected to make up 61.3% of the growth. Relative to a 62.5% share of population growth in 2012, a decline of 1.2 percentage points is expected.



Over the twelve months ending June 30, 2021, the natural increase component, births minus deaths, is projected to have a corresponding increase in its share of population growth, reaching 38.7%, or 6,800 individuals.

Alternate Versions of the Future

MBS' Medium scenario projects that the increase in Manitoba's population level between July 1, 2013 and July 1, 2020 will average out to 16,700 people per year. This results in an average annual change of 1.3% for Manitoba.



Over the same period, the Low scenario projects an average change of 1.2%, while the High scenario anticipates an average change of 1.4%.

In the shorter-term, the ten years between 2013 and 2023, MBS projects an average annual change of 1.3% for the Medium scenario. The Low and High scenarios predict average changes of 1.2% and 1.5%, respectively.

Looking 25 years into the future, between 2013 and 2038, the longer-term results from the Medium scenario project an average change in population of 1.3%. Alternatively, the Low scenario predicts an average annual change of 1.0%, while the High scenario anticipates an average change of 1.6%.

Manitoba's Changing Age Structure

At the Manitoba level, MBS' Medium scenario projects that the age ranges of 12 and under, 25 to 40 and 57 to 79 will show increases in population share between July 1, 2013 and July 1, 2020.

The shares for the age ranges of 13 to 24 and 41 to 56, on the other hand, are expected to show declines over the period. MBS anticipates that the 80 and over age range will show very little change in share.

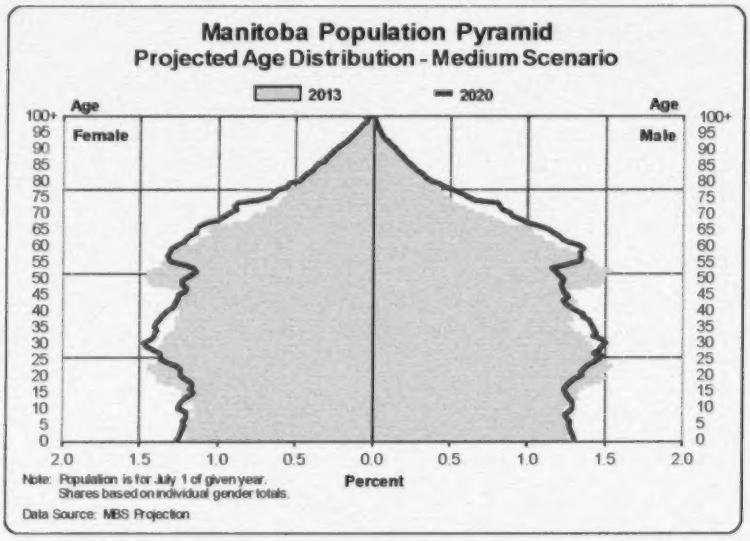


Figure 1:

Manitoba's Projected Population by Selected Age Group (Medium Scenario) - 2013 & 2020

Age Group	Projected Population 2013	2020	Total Change Level	%	Average Annual Change Level	%
0-4	79,700 (6.2%)	88,600 (6.3%)	8,900 (0.1 points)	11.2	1,300	1.6
5-17	208,300 (16.3%)	224,400 (16.0%)	16,100 (-0.3 points)	7.7	2,300	1.1
18-24	130,800 (10.2%)	126,800 (9.1%)	-4,000 (-1.1 points)	-3.1	-600	-0.4
18 & Over	993,500 (77.5%)	1,085,500 (77.6%)	92,000 (0.1 points)	9.3	13,100	1.3
15-64	859,100 (67.0%)	910,200 (65.1%)	51,100 (-1.9 points)	5.9	7,300	0.8
55-64	157,000 (12.3%)	177,700 (12.7%)	20,700 (0.4 points)	13.2	3,000	1.9
65 & Over	185,300 (14.5%)	225,800 (16.1%)	40,500 (1.6 points)	21.9	5,800	3.1
65-74	99,400 (7.8%)	130,300 (9.3%)	30,900 (1.5 points)	31.1	4,400	4.4
75-84	57,000 (4.4%)	65,000 (4.6%)	8,000 (0.2 points)	14.0	1,100	2.0
85 & Over	28,900 (2.3%)	30,500 (2.2%)	1,600 (-0.1 points)	5.5	200	0.8
All Ages	1,281,600	1,398,500	116,900	9.1	16,700	1.3

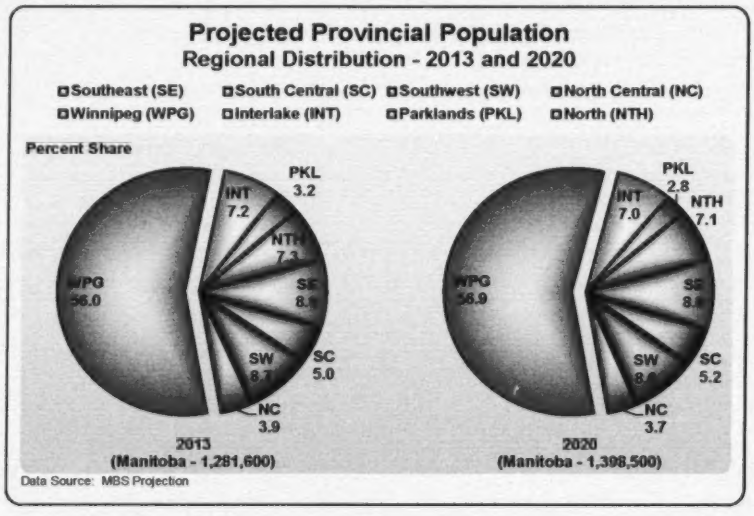
Note: Population is for July 1 of given year. Numbers may not add to totals due to rounding.
Numbers in brackets refer to an age group's percent share of total, or the change, in percentage points, thereof.

Data Source: MBS Projection

Regional Population Distribution

MBS anticipates the majority, 56.9% of Manitoba's residents, will reside in the Winnipeg region on July 1, 2020.

The second largest portion, 8.8% of Manitoba's 2020 population, is expected to reside in the Southeast region. The Southwest region, with 8.6% of Manitoba's population, is projected to be a close third. It is anticipated that the fewest Manitobans, 2.8%, will be living in the Parklands region.



Data Source: MBS Projection

The Parklands region is projected to record the largest decrease in its share of the provincial population, dropping by 0.4 percentage points between 2013 and 2020. The Southwest, North Central, Interlake and North regions are expected to have smaller losses in share. At the other extreme, the Winnipeg region is expected to have the largest increase in share, gaining 0.9 percentage points. The Southeast and South Central regions are each anticipated to increase their regional population share by 0.2 percentage points.

Regional Population Growth

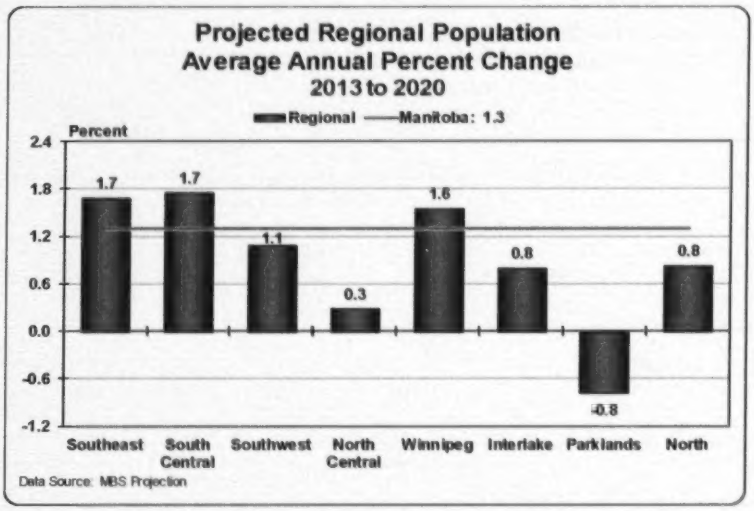
Figure 2:

Manitoba's Population (000's) by Economic Region - Estimated & Projected

Year (July 1)	2011	2013	2018	*2020*	2023	2028	2033	2038
Southeast	106.3	110.1	119.1	*123.2*	129.7	141.5	153.4	165.2
South Central	62.3	64.4	69.6	*72.2*	76.6	84.5	92.8	101.4
Southwest	110.1	111.8	117.7	*120.4*	124.5	131.4	138.2	145.0
North Central	50.2	50.2	50.7	*51.2*	52.0	53.4	54.6	55.6
Winnipeg	694.7	717.1	773.3	*795.3*	827.5	878.7	926.3	971.5
Interlake	91.7	92.9	96.5	*98.1*	100.8	105.3	109.4	112.9
Parklands	42.1	41.3	39.6	*39.0*	38.3	37.3	36.2	35.1
North	92.5	93.7	97.4	*99.2*	102.0	107.1	112.8	119.0
Manitoba	1,249.9	1,281.6	1,364.0	*1,398.5*	1,451.4	1,539.0	1,623.7	1,705.8

Data Source: Manitoba Bureau of Statistics - Estimates (2011) and Projections (2013 to 2038)

From July 1, 2013 to July 1, 2020, Manitoba's population is projected to increase by an average of 16,700 people annually. This results in an average annual growth rate of 1.3%. The Winnipeg region is expected to gain an average of 11,200 residents annually, accounting for 67.1% of the projected provincial increase.



MBS anticipates the Southeast (1.7%), South Central (1.7%) and Winnipeg (1.6%) regions will record the strongest average annual growth rates. The majority of the regions are expected to have more moderate rates of growth. The Parklands is the only region projected to show a decline in population, contracting by an average of 0.8% annually.

RELATED REPORTS

To order any of these publications, please contact MBS' general office at 204-945-2982.

Provincial Results

The following reports present results from MBS' **Low**, **Medium** and **High** projection scenarios.

Title	Catalogue	Price	Release Date
• Manitoba Population and Demographic Projections (2013 - 2048) - Summary	MBS 2014-2	$10	December 2014
• Manitoba Population and Demographic Projections: 2013 - 2048	MBS 2014-3	$75	January 2015

Regional Results

The following reports present regional results from MBS' **Medium** projection scenario.

Title	Catalogue	Price	Release Date
• Manitoba's Regions - Population and Demographic Projections: 2013 - 2038	MBS 2015-3	$100	August 2015
o **Southeast** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**A**	$15	August 2015
o **South Central** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**B**	$15	August 2015
o **Southwest** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**C**	$15	August 2015
o **North Central** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**D**	$15	August 2015
o **Winnipeg** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**E**	$15	August 2015
o **Interlake** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**F**	$15	August 2015
o **Parklands** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**G**	$15	August 2015
o **North** - Regional Population and Demographic Projections: 2013 - 2038	MBS 2015-3**H**	$15	August 2015